

WASHINGTON STATE DEPARTMENT OF PERSONNEL

CLERICAL, OFFICE SUPPORT & SECRETARIAL

OCCUPATIONAL CATEGORY

Category Concept

Positions in this category provide a variety of clerical services and/or secretarial duties in support of a work unit, department, supervisor(s), staff members, and/or general day-to-day office operations. Services provided and duties performed include functions such as the creation, storage, retrieval, mailing, and posting of documents, data, and records, providing assistance to others in direct support of the work, providing information to others about services available, assisting customers with access to services, updating web sites, preparing typed documents, screening calls and visitors, making travel arrangements, scheduling meetings, taking notes and transcribing minutes, keeping supervisor's and/or staff member's calendar(s) and committing supervisor's and/or staff member's time.

Positions in this category operate office equipment such as computers, work processors, typewriters, calculators and copy machines. Positions may operate word processing equipment a majority of the time and/or operate data entry equipment such as remote terminals, computers, reproducers, sorters, interpreters, and optical readers to input, retrieve, sort, and interpret data.

Note: The examples of work listed in the class specifications are not necessarily descriptive of any one position in the class. The omission of specific statements does not preclude management from assigning specific duties not listed. The intent of the listed examples is to give a general indication of the levels of difficulty and responsibility common to all positions in the class.

The following classifications are also included in this category. Revision of these classes is not proposed during this phase of the occupational category development process.

- 00900 Office Trainee
- 2220 Office Assistant I
- 01015 Office Support Supervisor 3
- 04010 Data Compiler 1
- 04020 Data Compiler 2
- 04030 Data Compiler 3

CLERICAL, OFFICE SUPPORT CLASSES

OFFICE ASSISTANT 2

(Class code)

Distinguishing Characteristics

Perform a variety of routine clerical duties such as processing documents and records, extracting and compiling records or data, responding to routine inquiries concerning office/departmental services and procedures, maintaining and monitoring established record keeping, filing and data base systems, and producing forms, letters, record entries and other material. Positions may perform data retrieval and modification and enter data on numeral or alphabetical data entry equipment.

Positions may occasionally help and/or provide work direction to lower level staff.

Examples of Work

- ◆ Following established guidelines, responds to inquiries regarding departmental services and procedures; answers telephones, receives and refers visitors;
- ◆ Sorts, files, and tabulates various documents and records; establishes and prepares new files or categories within established filing systems; enters and retrieves data using electronic files; removes and logs materials; maintains status and file reports;
- ◆ Performs basic word processing or typing tasks such as aligning text, setting margins and tables, saving or filing, spell checking, and printing to produce memos and letters;
- ◆ Perform electronic mail tasks;
- ◆ Cross checks and tabulates standard information; checks incoming forms and documents for required information; extracts and compiles statistical data from source documents;
- ◆ Orders, receives, and maintains office inventory following established procedures;
- ◆ Collects fees, maintains collection records, verifies and balances receipts, and prepares bank deposit documents;
- ◆ Drafts routine forms and letters; assembles reports; proofreads material making corrections for sentence structure, spelling, grammar, and punctuation;
- ◆ Receives, sorts, and distributes mail, messages, records, office supplies, and other materials;
- ◆ Performs tasks requiring the use of basic arithmetic such as addition, subtraction, multiplication and division.

OFFICE ASSISTANT 3

(Class code)

Distinguishing Characteristics

Under general supervision, independently perform a variety of complex clerical projects and assignments such as preparing reports, preparing, reviewing, verifying and processing fiscal documents and/or financial records, composing correspondence such as transmittals and

responses to frequent requests for information, establishing manual or electronic recordkeeping/filing systems and/or data base files, and responding to inquiries requiring substantive knowledge of office/departmental policies and procedures. Positions may perform specialized complex word processing tasks in a word processing unit or complex rapid data inquiry and/or entry functions

Positions typically provide work direction to lower level staff and may assist in training new staff.

Examples of Work

- ◆ Resolves problems and responds to inquiries regarding rules, regulations, policies, department procedures, and department services; answers telephone; receives and refers visitors;
- ◆ Reviews documents, records, or applications for completeness, accuracy, and compliance with rules; determines and explains action necessary to achieve compliance or approval;
- ◆ Composes office correspondence such as requests for documentation and responses to requests for information; devises, evaluates and revises forms for internal use;
- ◆ Reviews and verifies fiscal reports for accuracy; investigates and corrects errors to ensure compliance with established procedures and policies; uses basic arithmetic to perform computations;
- ◆ Establishes and maintains complex electronic or manual file systems or data base files;
- ◆ Prepares or assists in the preparation, compilation, and coordination of reports and records such as financial, payroll, labor distribution, equipment usage, purchasing, inventory, personnel, scheduling, registration, and testing;
- ◆ Compiles and produces material such as financial statements, manuscripts, schedules, test materials, engineering/construction reports, and technical and statistical reports requiring specialized knowledge and judgment in selection and treatment of data and format; prepares, tables, charts and graphs as required;
- ◆ Performs complex word processing tasks such as merging and sorting, integrating text with graphics, spreadsheet, and data base files, uploading/downloading, and creating footnotes and outlines; uses spreadsheet and data base software to develop and maintain records; uses basic statistical software packages; performs simple computer inquiry programming; uses graphics software and recommends appropriate display of information;
- ◆ Order, receive and maintain inventory;
- ◆ May assist in studies, surveys and the preparation of reports by gathering and computing numerical information; draft for supervisor's review narrative interpretation of information to

be included in reports; review reports for clarity and accuracy; refer questionable data or narrative to supervisor for clarification.

OFFICE ASSISTANT LEAD

(Class code)

Distinguishing Characteristics

As a unit's designated lead worker, assigns, instructs and checks the work of subordinate office support staff, plans and organizes work, and performs a variety of complex clerical projects and assignments such as establishing and revising electronic or manual record keeping systems including data base files, monitoring and evaluating financial records and/or documents, resolving clerical problems, responding to inquiries regarding policies, procedures, and services, drafting correspondence, compiling reports, and reviewing, screening, verifying, and evaluating applications, forms, or requests for information. Duties performed require substantive knowledge of a variety of regulations, rules, policies, procedures, processes, materials, or equipment.

Examples of Work

- ◆ Regularly assign, instruct and check the work of others as a significant portion of overall delegated responsibilities;
- ◆ Perform the duties of Office Assistant 3;
- ◆ May use computer to compile data; review computer print-outs for accuracy and completeness; review and assign codes given to data, for data entry purposes;
- ◆ May tabulate numerical data from information provided and prepare numerical summaries, organizational charts, work flow charts and graphs;
- ◆ May compare data from various sources to identify trends, differences, similarities, etc.

OFFICE SUPPORT SUPERVISOR 1

(Class code)

Distinguishing Characteristics

Supervises staff in a clerical unit and performs the work of the unit. Incumbents have delegated authority to interview and recommend selection of applicants, conduct training, assign and schedule work, act upon leave requests, conduct annual performance evaluations and recommend corrective or disciplinary actions. Incumbents review the work of lower level staff and use independent judgment to accomplish assignments, develop or revise work methods, procedures or strategies, resolve problems, interpret rules, policies and procedures, and make recommendations regarding unit budget.

Examples of Work

- ◆ Act as liaison to other departments; resolve problems that arise between unit personnel and persons served, both within and outside of the unit;
- ◆ Develop and implement procedures, forms, work methods, schedules, job priorities, etc., to be followed by subordinates and coordinate work flow therein;
- ◆ Develop and prepare reports related to the activities of the unit;
- ◆ Coordinate and supervise others involved in the activities of the unit including the development, preparation and maintenance of departmental records, databases, statements of income and expenditures and summaries of departmental operation;
- ◆ Communicate instructions from technical and administrative supervisors;
- ◆ Consult with appropriate management regarding clerical requirements and make recommendations regarding necessary budgeting of unit to accommodate staffing, equipment, supplies, and facility costs; prepare budget recommendations and monitor budget;
- ◆ Perform duties of unit staff;
- ◆ May review data for completeness and accuracy; refer questionable data or narrative to originator for clarification;
- ◆ May use computer to summarize data, compile and compute data, compose reports, etc.; compose narrative reports that include identification and evaluation of problems and resolutions;
- ◆ May collect, review and classify data to assist other staff in evaluating and determining a plan for future research development.

OFFICE SUPPORT SUPERVISOR 2

(Class code)

Distinguishing Characteristics

Supervises staff and/or subordinate supervisors assigned to a variety of occupational categories or performing a variety of office support functions such as accounting, office support, data entry and inquiry, or word processing. Incumbents spend a majority of time overseeing and coordinating day-to-day unit operations, use independent judgment to accomplish assignments or solve problems, develop new work methods, procedures, or strategies or modify existing work methods, procedures, and strategies to solve new or unusual problems that impact the unit and requestor of services, and plan and prioritize work to meet internal and external deadlines.

Examples of Work

- ◆ Act as liaison to other departments; resolve problems that arise between unit personnel and persons served, both within and outside of the unit;

- ◆ Develop and implement procedures, forms, work methods, schedules, job priorities, etc., to be followed by subordinates and coordinate work flow therein;
- ◆ Develop and prepare reports related to the activities of the unit;
- ◆ Coordinate and supervise others involved in the activities of the unit including the development, preparation and maintenance of departmental records, databases, statements of income and expenditures and summaries of departmental operation;
- ◆ Communicate instructions from technical and administrative supervisors;
- ◆ Consult with appropriate management regarding clerical requirements and make recommendations regarding necessary budgeting of unit to accommodate staffing, equipment, supplies, and facility costs; prepare budget recommendations and monitor budget;
- ◆ Perform duties of unit staff.

Desirable Qualifications and Competencies

There are no legal requirements for these classes. Individual positions may have specific skill and competency or minimum requirements.

Office Assistant 2:

Positions typically require high school graduation or equivalent and one year of clerical experience.

Office Assistant 3:

Positions typically require high school graduation or equivalent and two years of clerical experience.

Office Assistant Lead:

Positions typically require high school or equivalent and two years of experience including experience directing the work of others.

Office Support Supervisor 1:

Positions typically require high school graduation or equivalent and three years of experience including full-time experience as a lead worker.

Office Support Supervisor 2:

Positions typically require high school graduation or equivalent and three years of experience including one year of supervisory experience.

Competencies include: **(PLACEHOLDER ONLY)**

New classes effective: TBD

Office Assistant 2 (replaces 01010 Office Assistant, 2221 Office Assistant II.)

Office Assistant 3 (replaces 2222 Office Assistant III, 01011 Office Assistant Senior, 04010 Data Compiler 1.)

Office Assistant Lead (replaces 01012 Office Assistant Lead, 2223 Office Assistant Lead, 04020 Data Compiler 2.)

Office Support Supervisor 1 (replaces 2215 Office Support Supervisor I, 01013 Office Support Supervisor 104030 Data Compiler 3.)

Office Support Supervisor 2 (replaces 01014 Office Support Supervisor 2, 2216 Office Support Supervisor II.)

SECRETARIAL CLASSES

SECRETARY

(Class code)

Distinguishing Characteristics

Perform routine secretarial duties such as making travel arrangements, scheduling meetings, taking notes and transcribing minutes, keeping supervisors and/or staff members calendar(s), producing final copy documents from drafts, shorthand, speedwriting, or machine transcription, composing forms and letters, and responding to inquiries from staff, students, and/or the public regarding departmental procedures or services.

Duties and assignments are of a routine nature. Routine duties are recurring and accomplished by following established work methods or procedures. Within established guidelines, independently organizes, prioritizes, and initiates work activities. Decision making authority is limited to choice of appropriate methods or procedures. Guidance is provided in new or unusual situations. Deviation from established methods, procedures, or guidelines requires approval. Work is periodically reviewed to verify compliance with policies, procedures, or standards.

Examples of Work

- ◆ Performs secretarial duties including making travel arrangements, scheduling meetings, and keeping supervisors and/or staff members calendar(s);

- ◆ Answer telephones; receive and refer visitors including students, staff and/or the public; respond to inquiries regarding departmental procedures and services;
- ◆ Uses computer, word processor, or typewriter to produce letters, meeting notices and agendas, reports, manuscripts, financial statements, schedules, test materials, student evaluations, and other documents from rough drafts, machine dictation, notes, shorthand, or speedwriting; takes and transcribes meeting minutes;
- ◆ Performs word processing tasks such as merging and sorting, integrating text with graphics, spreadsheet, and data base files, uploading/downloading, and creating footnotes and outlines; uses spreadsheet and data base software to maintain records; uses graphics software and recommends appropriate display of information;
- ◆ Proofreads material correcting for sentence structure, spelling, grammar, and punctuation;
- ◆ Screens and distributes mail and messages; distributes records, office supplies, and other materials; orders, receives, and maintains inventory;
- ◆ Relays messages and instructions from supervisor(s) to others;
- ◆ Posts information to various electronic or manual departmental, financial, or other records according to established procedures and standards;
- ◆ Sorts, files, and tabulates various documents and records; establishes and prepares new files or categories within established filing systems; enters and retrieves data using electronic files; removes and logs materials; maintains status and file reports;
- ◆ Maintains and monitors budget and fiscal records and informs supervisor of status;
- ◆ Keeps account records including tasks such as scheduling and vouchering of requisitions, invoices, and payroll;
- ◆ Performs electronic mail tasks;
- ◆ Performs tasks requiring the use of basic arithmetic including addition, subtraction, multiplication, and division.

SECRETARY SENIOR

(Class code)

Distinguishing Characteristics

Perform complex secretarial duties such as independently planning, organizing and prioritizing work, monitoring and evaluating budget(s) status and initiating corrections, developing travel itineraries, compiling reports, studies, and/or applications, developing, modifying, and/or maintaining data base management, office record keeping, or filing system(s), establishing office procedures, standards, priorities, and deadlines, and coordinating office operations. Positions

initiate action to ensure work unit and/or office goals are met and have frequent contacts with clients, the public, staff members from other departments, students, and faculty.

Assignments and projects are of a complex nature. Independent performance of complex secretarial assignments requires substantive knowledge of a variety of regulations, rules, policies, procedures, processes, materials, or equipment. Problems are resolved by choosing from established procedures and/or devising work methods. Guidance is available for new or unusual situations. Deviation from established parameters requires approval. Work is periodically reviewed to verify compliance with established policies and procedures.

Examples of Work

- ◆ Formats transcription from rough draft, shorthand, speedwriting, or recording equipment; takes meeting minutes; composes and keyboards or types letters, meeting notices, and agendas; compiles and produces reports, studies, manuscripts, applications, financial statements, schedules, test materials, evaluations, and other documents;
- ◆ Proofreads material making corrections for sentence structure, spelling, grammar, and punctuation;
- ◆ Resolves problems and responds to inquiries regarding procedures and services; answers telephones; receives, screens and refers visitors;
- ◆ Establishes office procedures, standards, priorities, and deadlines;
- ◆ Establishes or revises electronic or manual files;
- ◆ Maintains, monitors, and evaluates budget or fiscal records; completes or processes requisitions, invoices and payroll, and initiates corrections;
- ◆ Attends meetings on behalf of supervisor(s) or work group; represents supervisor or work group in supervisor's absence;
- ◆ Relays messages and instructions from the supervisor(s) to others;
- ◆ Maintains supervisor's calendar(s) and makes appointments; schedules and arranges meetings; makes room reservations;
- ◆ Provides information related to supervisor's planning, organizing and operation of the department or unit;
- ◆ Makes travel arrangements for supervisor(s) and staff; and maintains records of travel itineraries; compiles final travel expense reports;
- ◆ Orders supplies, equipment, printing, and arranges for facility and equipment maintenance and repair contracts and services;

- ◆ Maintains records of incoming and outgoing correspondence and documents and follows up on work in process;
- ◆ Reviews publications for articles or reports on subject matter of special interest, obtains copies and maintains files of such information;
- ◆ Performs complex word processing tasks such as merging and sorting, integrating text with graphics, spreadsheet and data base files, uploading/downloading, and creating footnotes and outlines; uses spreadsheet and data base software to develop and maintain records; uses basic statistical software packages; prepares spreadsheets involving the development of formulas; combines files to create reports; uses graphics software and recommends appropriate display of information;
- ◆ May use various operating systems and software to process technical manuscripts, examinations and correspondence which include equations, formulas, structural representations, statistical tables, graphs and schematics, and specialized terminology;
- ◆ May take dictation of materials including the substantial use of mathematical equations, chemical formulas, and structural representations, statistical tables, engineering graphs and schematics, and science/engineering terminology;
- ◆ May produce technical manuscripts, examinations, and correspondence containing equations, formulas, statistical tables, graphs, and schematics.

SECRETARY LEAD

(Class code)

Distinguishing Characteristics

Regularly assigns, instructs and checks the work of office support staff and performs the duties of Secretary Senior including complex secretarial duties such as independently planning, organizing and prioritizing work, monitoring and evaluating budget(s) status and initiating corrections, developing travel itineraries, compiling reports, studies, applications, and developing, modifying and/or maintaining data base management, office record keeping, or filing system(s). Positions establish office procedures, standards, priorities, and deadlines, coordinate office operations, initiate action to ensure work unit and/or office goals are met, and have frequent contacts with clients, the public, staff members from other departments, students, and faculty.

Assignments and projects are of a complex nature. Independent performance of complex secretarial assignments requires substantive knowledge of a variety of regulations, rules, policies, procedures, processes, materials, or equipment. Problems are resolved by choosing from established procedures and/or devising work methods. Guidance is available for new or unusual situations. Deviation from established parameters requires approval. Work is periodically reviewed to verify compliance with established policies and procedures.

Examples of Work

- ◆ Coordinates office operations;
- ◆ Regularly assign, instruct and check the work of others as a significant portion of overall delegated responsibilities;
- ◆ Perform the duties of Secretary Senior.

SECRETARY SUPERVISOR

(Class code)

Distinguishing Characteristics

Supervise office support staff, interview and recommend selection of applicants, conduct training, assign and schedule work, act upon leave requests, conduct annual performance evaluations and recommend corrective and/or disciplinary actions. Positions establish office procedures, standards, priorities, and deadlines and have frequent contacts with clients, the public, students, faculty, staff members from other departments, and management staff. Positions perform complex secretarial duties such as independently planning, organizing and prioritizing work to meet internal and external deadlines, monitoring and evaluating budget(s) status and initiating corrections, developing travel itineraries, compiling reports, studies, and applications, developing, modifying, and/or maintaining data base management, office record keeping, or filing system(s), coordinating office operations and initiating action to ensure work unit and/or office goals are met. Positions may perform administrative duties as delegated by the supervisor and/or provide and coordinate administrative support functions for a large unit.

Exercise independent judgment to accomplish assignments or solve problems and to develop new work methods, procedures, or strategies or modify existing work methods, procedures, and strategies to solve new or unusual problems. Work is subject to review at the completion stage to determine effectiveness in producing expected results.

Examples of Work

- ◆ Supervises staff; coordinates office operations; performs the duties of Secretary Lead;
- ◆ Represents supervisor(s) as delegated;
- ◆ Provides information related to supervisors planning, organizing and operation of the department or unit;
- ◆ Assures that supervisor and staff are fully briefed before scheduled meetings on matters to be considered;
- ◆ Maintains, monitors, and evaluates budget or fiscal records; completes or processes requisitions, invoices and payroll; identifies problems and initiates corrections; assists in the development of organization budget.

Desirable Qualifications and Competencies

There are no legal requirements for these classes. Individual positions may have specific skill and competency or minimum requirements.

Secretary:

Positions typically require high school graduation or equivalent and one year of office experience requiring keyboarding or typing.

Secretary Senior:

Positions typically require high school graduation or equivalent and two years of increasingly responsible office experience requiring keyboarding or typing.

Secretary Lead:

Positions typically require high school graduation or equivalent and two years of increasingly responsible office experience requiring keyboarding or typing and including experience directing the work of others.

Secretary Supervisor:

Positions typically require high school graduation or equivalent and three years of increasingly responsible office experience requiring keyboarding or typing and including experience leading the work of others.

Competencies include: **(PLACEHOLDER ONLY)**

New classes effective TBD

Secretary (replaces 01020 Secretary, 2243 Secretary.)

Secretary Senior (replaces 01021 Secretary Senior, 2244 Secretary-Senior, 2238 Technical Secretary.)

Secretary Lead (replaces 01022 Secretary Lead, 2246 Secretary Lead.)

Secretary Supervisor (replaces 01024 Secretary Supervisor, 2245 Secretary Supervisor.)